Company Settings

Company Settings let you shape how Paperless Pipeline works for your business. They define your company identity, control key behaviors across documents, transactions, and checklists, and determine how your team interacts with the system.

Introduction

Global Settings

Document Settings

Only Allow PDF Documents

Prevent Duplicate Document Uploads

Email Settings

Email agents expiring and closing transaction reminders

Email agents when admin comments on documents

Email monthly production summary to agents

Email admins agent anniversary reminders

Use minimal formatting for messages sent from transactions.

Transaction Coversheet Layout

Feature Settings

Require two-factor authentication

Enable Reviewed Docs functionality

Enable Entered Docs feature

Enable New Offer feature

Checklist Settings

Show checklist completion percentages to agents

Hide completed tasks in transaction checklists

Show checklists from all locations in the Add Checklists dropdown menu

Transaction Settings

Enable auto-expiration of transactions in Listed status

Require transaction label

Allow agents to change transaction status to closed, terminated, and expired

Prevent agents from viewing other side's messages on transactions

Only include completed transactions in monthly backups

Transaction Name Instructions

Default Text for Flexible Fields

Optional Fields

Welcome Email Settings

Admin & Tech Support Contact

Home Page Announcements